



OSC HR/Payroll SAP Training



# Leave of Absence

## PA420



SLIDE 1


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**Notes:**

## OSC HR/Payroll Training - Welcome

Welcome to the *Advanced Create and Maintain Employee Data* course.

- Introductions
- Sign-in sheet
- Tent cards
- Restrooms
- Breaks
- Parking lots
- Classroom etiquette
  - Cell phones off
  - Quiet side conversations
  - No texting





SLIDE 2

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### Notes:

The course introduction is an opportunity to get to know the others who are attending class, as well as to agree on classroom courtesy. The Instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

### Prerequisites



- BEACON Overview BC100
- SAP Basic Navigation BC110
- Personnel Administration Overview PA200
- Personnel Administration Terms, Concepts, and Display Data PA210
- Create and Maintain Employee Data PA310
- Modifying Position/Employee Data and Reporting PA313

SLIDE 3

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### Notes:

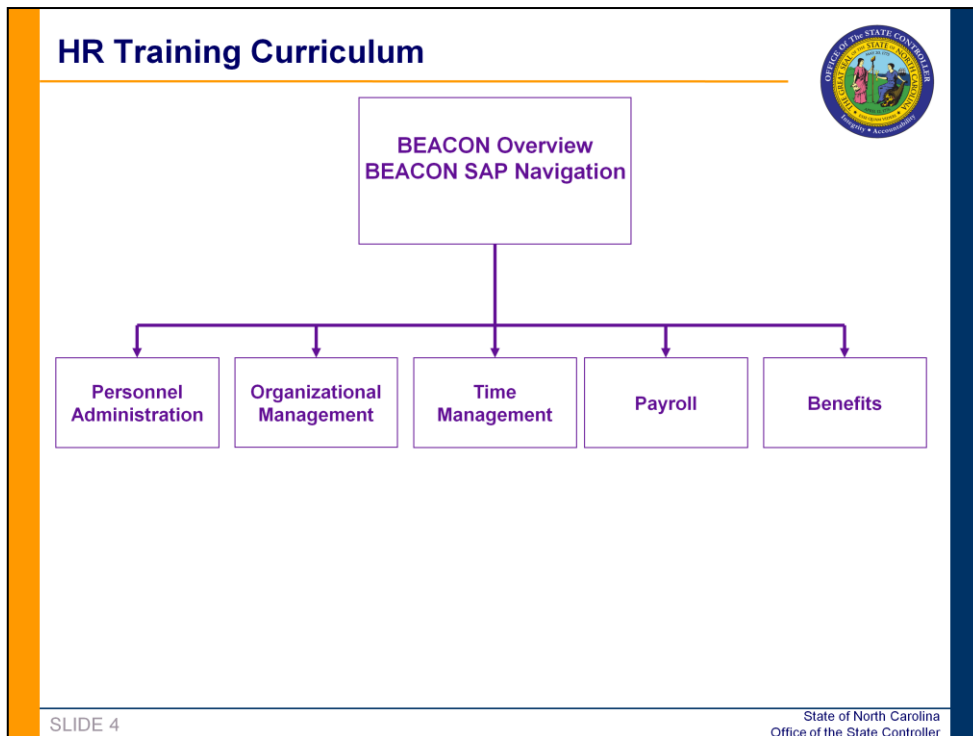
There are several pre-requisites that you must take before attending this course. Attending these pre-requisites ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Advanced Create and Maintain Employee Data* course.

BC100, BC110 and PA200 are self-paced web courses that you can take at anytime.

PA210 is taught both virtually or as an instructor-led class.

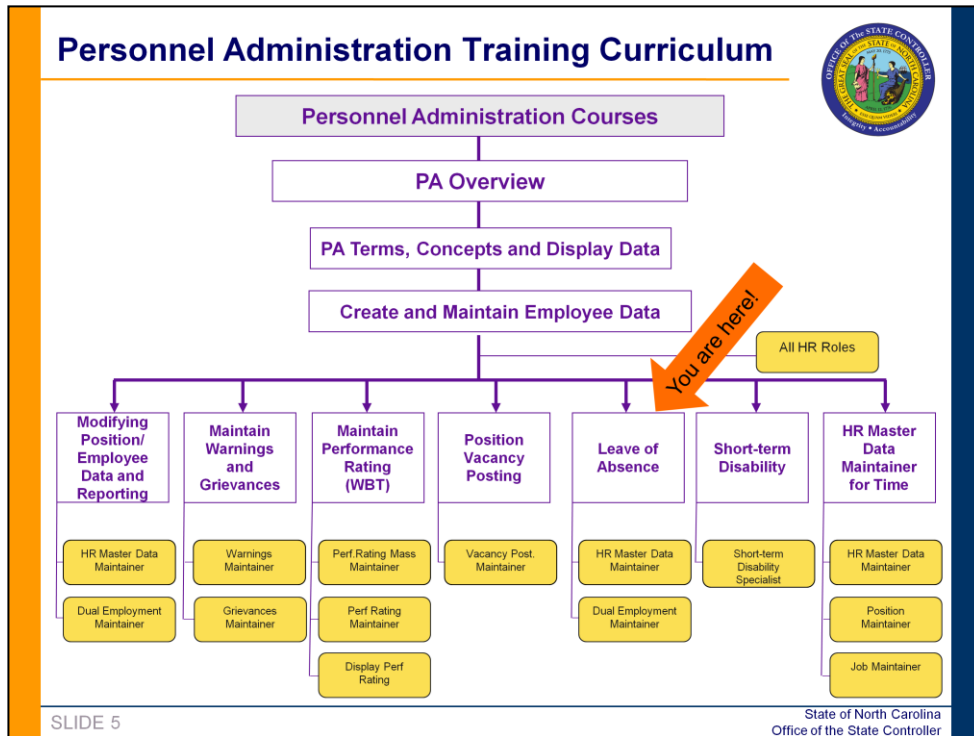
PA310 is an instructor-led class.

PA313 is taken in the Virtual Classroom.



**Notes:**

The OSC HR/ Payroll training program comprises several courses and different modules. Based on your HR role you will attend courses in the Personnel Administration module.




Within the Personnel Administration module, there are several courses. Your position determines which courses you may be required to attend.

### Notes:

## Course Map

- Lesson 1: Leave of Absence (LOA) Overview
- Lesson 2: Creating a Leave of Absence
- Lesson 3: Reinstating an Employee from LOA
- Lesson 4: Benefits and Leave of Absence
- Lesson 5: Course Review



SLIDE 6

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**Notes:**

### Course Objectives



Upon completion of this course, you should be able to:


- Describe the various reasons for a Leave of Absence and determine when each is applicable to use
- Execute a Leave of Absence
- Run the Date Monitoring Report
- Reinstatement an employee from Leave of Absence

SLIDE 7

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**Notes:**

### Welcome: Strategy for Training



- Tell me**  
**Concepts**  
Your Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN
- Show me**  
**Demonstrations**  
Your Instructor will demonstrate job-related tasks performed in OSC HR/Payroll SAP – HANDS OFF
- Let me**  
**Exercises**  
You will complete the exercises which allow for hands-on practice in class – HANDS ON
- Support me**  
**Availability**  
Your Instructor will be available to answer questions while you complete the exercises

SLIDE 8

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### Notes:

The *Leave of Absence* Student's Guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the OSC HR/Payroll SAP training environment.

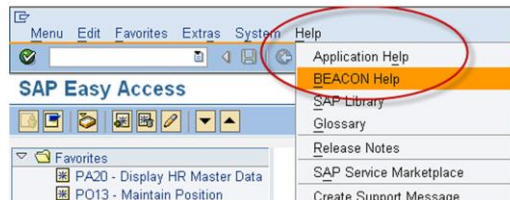
You may also find it useful to take the Employee Self-Service and Manager Self-Service courses, although they are not required for the PA curriculum. They are, however, mandatory for other requirements.



## Reference Materials



- Student Guide
- Exercise Guide
- Online resources at Beacon University
  - Business Process Procedures (BPPs)
  - Job Aids
  - BEACON Help




SLIDE 9

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**Notes:**

## Course Map

- Lesson 1: Leave of Absence (LOA) Overview
- Lesson 2: Creating a Leave of Absence
- Lesson 3: Reinstating an Employee from LOA
- Lesson 4: Benefits and Leave of Absence
- Lesson 5: Course Review



SLIDE 10

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**Notes:**

### Lesson Objectives



Upon completion of this lesson, you should be able to:

- Describe the checklist tasks you should perform before entering a Leave of Absence (LOA) Action
- Identify the transaction code and various infotypes associated with an LOA
- Describe the interaction of the infotypes within the LOA Action and with the Time, Benefits, and Payroll modules
- List the reasons associated with an LOA Action
- Describe the FMLA steps that are not part of the LOA Action

SLIDE 11

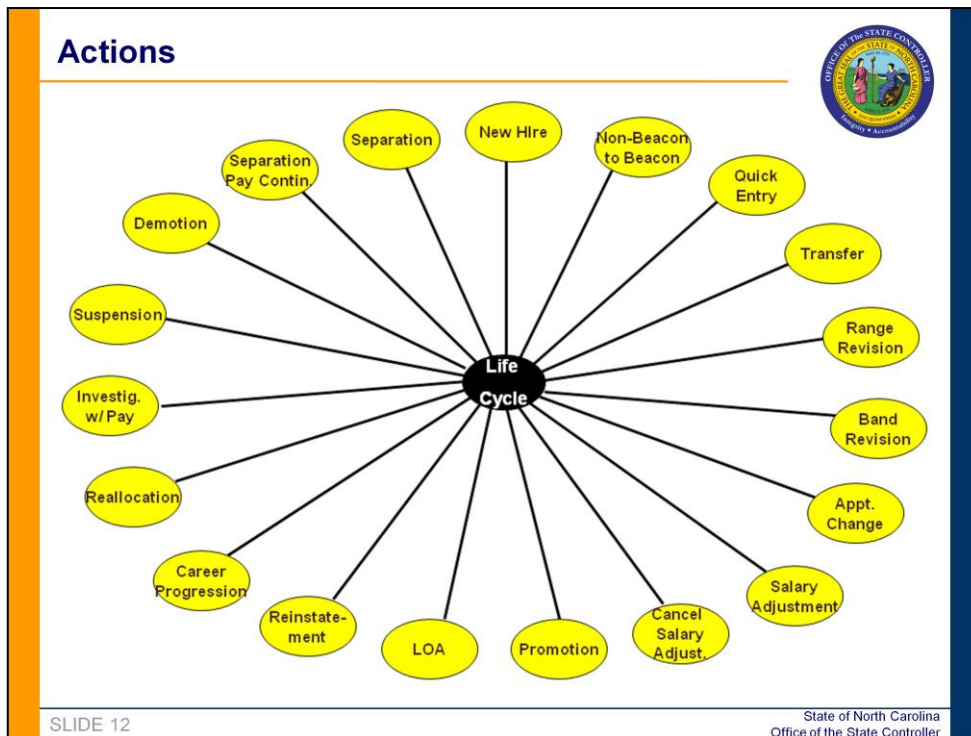
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### Notes:

This lesson focuses on the process and infotypes that are applicable to all Leave of Absence Actions.

## PA 310 – Create and Maintain Employee Data

### Employee Data




### Notes:

As discussed in the *PA Terms, Concepts and Display Data* course, the life cycle of an employee comprises many different events. OSC HR/Payroll SAP defines those events as a specific infotype called **Actions** (0000). Actions for the State of North Carolina are shown above. New Actions that were not part of the PMIS system include: Investigatory, Separation Pay Continuation, Quick Entry, and LOA (Leave of Absence). Observe there is no longer a separate LWOP Action. LOA replaces LWOP.

An Action combines logically related infotypes into one infogroup. The infotypes in the infogroup are sequentially arranged and automatically display. This helps to simplify the data entry for the Action. You don't have to remember whether a particular infotype should be included—OSC HR/Payroll SAP automatically includes the infotypes that are associated with a particular Action. Depending upon the employee's specific data, you may not need to enter data on each of the infotypes presented in the Action.

### LOA in OSC HR/Payroll SAP

- LOA in OSC HR/Payroll SAP
  - Employee is active in the system; employee is not withdrawn from the system
  - Time, benefits, payroll, State Service and longevity are dependent on entries made for action, reason and infotypes
- Best Business Practice
  - Time (leave) is entered only by agency; employee does **not** enter time (leave)
  - One agency person should be responsible for both Time and Personnel Administration
    - Agency can made agency-wide decision that time is entered by Time Administrator
  - Only applicable leave code or 9400 (unpaid leave) is entered; **not** code 9500



SLIDE 13

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### Notes:

There is only one Action – Leave of Absence in OSC HR/Payroll SAP. That one action is used for **both** leave **with** pay and **without** pay (in the previous system there were two separate actions). The combination of the Action/reason and data entered on the infotypes indicate to OSC HR/Payroll SAP whether to pay the employee or not.


In OSC HR/Payroll SAP, an employee out on leave of absence, both paid and unpaid, is still active in the system (the employee is not in withdrawn status). Time, benefits, payroll, State Service and longevity are programmed to act in specific ways depending upon the entries made on the Action/reason and the infotypes that are part of the Action.

OSC HR/Payroll SAP is designed for one person, usually Personnel (PA) Administration, to be responsible for time entry for an employee on leave of absence. However, while it is a best practice that time is entered in PA, each agency can make an agency-wide (not individual user) decision that time is entered by the Time Administrator when the employee is on LOA. Regardless of which decision the agency makes (entered by PA or Time), it should be remembered that:

- An employee should make no time entries while on LOA. The entries are to be made only by the agency (either PA or Time).
- Under no circumstances should code 9500 (time worked) be entered when an employee is on LOA. An employee should not be on leave and also be working.

### Before You Begin LOA Checklist

- PA30 or PA20
  - IT0000 – Actions
    - View employee's last Action
    - Verify eligible for requested leave
- CATS\_DA to see if time prior to LOA has been entered, released and approved.
- If employee is using leave for LOA, access PT50 to ensure that employee has enough in leave balance.
- Communicate with the Benefits Representative



SLIDE 14

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### Notes:

Before processing any type of Leave of Absence (LOA) use the above checklist.

#### **Actions**

View Actions to verify that the employee has a hire date and is in a status that qualifies him or her for leave.

#### **CATS\_DA**

All time prior to LOA must be entered, released and approved before an employee goes out on leave. After the LOA Action has been entered, the employee should not be entering and releasing time. It is especially important for time to be entered, released and approved if the employee plans to use any leave accruals while out on LOA.

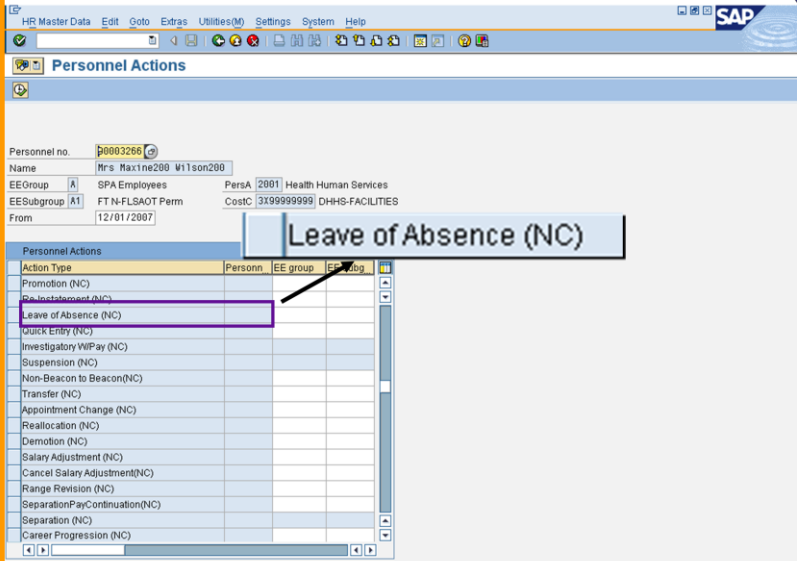
#### **PT50**

If the employee has indicated a certain type of leave usage while on LOA, use this transaction to verify that enough of that leave type is available to use.

#### **Benefits**

The Benefits Representative will have to take certain steps to communicate with the employee who is going out on leave, especially unpaid leave. Be sure to inform the Benefits Representative when an employee is out on LOA (more about Benefits in a subsequent lesson).

## Leave of Absence Process



The screenshot shows the SAP HR Master Data interface. The 'Personnel Actions' tab is active. The 'Leave of Absence (NC)' action type is highlighted in the list. A callout box points to this action type.

Personnel no. **p0003266**  
 Name **Mrs. Maxine200 Wilson200**  
 EEOGroup **A** SPA Employees PersA **2001** Health Human Services  
 EESubgroup **A1** FT N-FLSAOT Perm CostC **3199999999** DHHS-FACILITIES  
 From **12/01/2007**

**Leave of Absence (NC)**

Personnel Actions

Action Type	Person	EE group	EE Subg
Promotion (NC)			
Re-Instatement (NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory WfPay (NC)			
Suspension (NC)			
Non-Beacon to Beacon (NC)			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion (NC)			
Salary Adjustment (NC)			
Cancel Salary Adjustment (NC)			
Range Revision (NC)			
Separation Pay Continuation (NC)			
Separation (NC)			
Career Progression (NC)			

SLIDE 15

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A **Leave of Absence** occurs when an employee is out of work on paid or unpaid leave. You will observe there is only one LOA Action with no indication about whether it is paid or unpaid (LOA replaces LWOP). To aid in tracking employee leave activities, OSC HR/Payroll has added more LOA reasons than the previous system had, especially for Worker's Compensation (WC) and Military.

### Notes:

#### **Reasons associated with the LOA Action**

- FMLA
- Family Illness Leave
- Reserve Active Duty (30 days)
- Reserve Active Duty (Lump Sum)
- WC LOA w/supplement
- WC LEO Continuation Pay
- Injury Leave
- S/T Disability 60-Day w/Period
- Short-Term Disability Extended
- Other
- Reserve Active Duty
- Extended Military
- Parental (not FMLA)
- Extended Illness
- Reserve Active Duty (Leave)
- WC 7 Day Waiting Period
- WC Leave of Absence
- WC Correctional Off (Custody)
- Education
- Short-Term Disability Regular
- Short-Term Disability (Lump Sum)
- Emergency Layoff
- Short-Term Disability (Leave)

**NOTE:** The agency can determine whether or not an employee is placed on LOA with pay to track long-term leave usage for available approved leave (for example, an employee is using vacation for 4 weeks). In this case, using the LOA reason "other" would be applicable.

## Leave of Absence Reasons

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**Medical**

- FMLA
- Parental (not FMLA)
- Family Illness Leave
- Extended Illness
- S/T Disability 60 Day w/Period
- Short – Term Disability Regular
- Short – Term Disability Extended
- Short – Term Disability (Lump Sum)
- Short – Term Disability (Leave)

Covered in  
separate course

**Military**


- Reserve Active Duty (30 days)
- Reserve Active Duty (Leave)
- Reserve Active Duty (Lump Sum)
- Reserve Active Duty
- Extended Military

**Worker's Comp**

- WC 7 Day Waiting Period
- WC LOA w/supplement
- WC Leave of Absence
- WC LEO Continuation Pay
- WC Correctional Off (Custody)

**Miscellaneous**

- Education
- Emergency Layoff
- Other
- Injury leave (has different rules than WC)



SLIDE 16
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Although the reasons are shown in SAP in a list, you can mentally group them into four categories as illustrated above.

Short-term disability is not discussed in this course. It is covered in a separate course entitled *PA370 Short-Term Disability*.

### **Time/Leave Administration and FMLA**

It is very important for HR to enter the LOA Action before the Time/Leave Administrator enters the event into the FMLA Workbench. The LOA Action is not automatically connected to the FMLA Workbench; therefore, HR should coordinate with the Time/Leave Administrator when an LOA Action is entered. Time/Leave Administration is responsible for the **tracking** of FMLA eligibility and number of hours that the employee has used related to FMLA.

When the FMLA event is entered into the FMLA Workbench by Time/Leave, the Workbench automatically checks an employee's eligibility for FMLA. Based on OSP policy, an employee's eligibility is related to his or her length of total State Service and hours worked during the previous 12 months.

After an employee has exhausted all of his or her leave entitlement, the FMLA Workbench will also manage the employee's eligibility for subsequent leave entitlements.


### **Intermittent FMLA**

If an employee is absent intermittently on FMLA, you do not execute a LOA Action. In that case, the Time Administrator enters the FMLA event using PTFMLA. The Leave Administrator tracks absences associated with the FMLA event.

### **Notes:**



## Additional Resources



urg\_mgmt

Personnel\_Admin

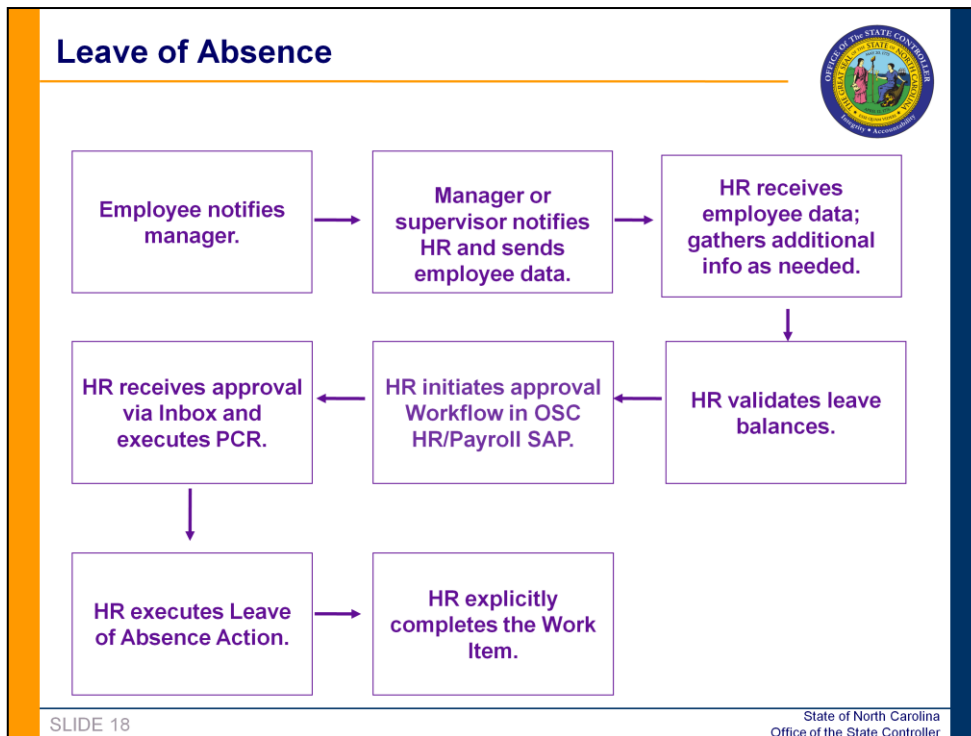
- [-] Date Specifications PA30
- [-] Display Position Data PPOSE
- [-] Maintain Disciplinary Actions PA30
- [-] Maintain Master Data PA30
- [-] PA30 Change Work Schedule IT0007 PA30
- [-] PA30 Create an Adjustment Reason PA30
- [-] PA30 Maintain Grievance PA30
- [-] PA30: Create Performance Rating IT0024 PA30
- [-] Job\_Aids
  - [-] Dashboard for PA\_back V3\_022608
  - [-] Dashboard for PA\_front V2\_020108
  - [-] Enter Verified Education V1\_021308
  - [-] Filter\_Key\_Figures
  - [-] How-to-search-for-a-position-in-SAP-when-I-have-the-PMS-position-number-Ver+1.0
  - [-] IT0102\_Disciplinary Actions\_Screens\_021009
  - [-] IT0102\_Grievances\_Screens\_021009
  - [-] Length of Service
  - [-] LOA Quick Reference New Process
  - [-] Maintain Text on Infotypes in PA
  - [-] OM&PA Job Aid\_Changing Position Eligibility Settings
  - [-] PA FAQ
  - [-] PA\_Actions-Reasons-Definitions\_121808
  - [-] PA\_Employee\_Group-Subgroup
  - [-] PA\_Infotypes V3\_021908
  - [-] PA310\_BI\_Reports\_Job\_Aid
  - [-] PA410\_Dual Employment Outline OSP for BEACON\_030508
  - [-] PA410\_DualEmployForm\_030508

SLIDE 17
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## Notes:

It is very important to choose the correct **reason** associated with each LOA. The *PA\_Actions- Reasons -Definitions* job aid, located on BEACON University, contains a detailed explanation of each reason for LOA. Use the following path to locate the job aid:

Human Resources > Personnel Administration > Job Aids > PA\_Actions-Reasons –Definitions.

**Notes:**

LOA is used to track various activities regarding an employee's leave of absence. As a result, you may need to make more than one entry for the Action (along with the associated reason) when an employee is on LOA (refer to the *LOA Quick Reference New Process* job aid online at BEACON University). In OSC HR/Payroll you will now have a complete history of the activity for a particular LOA (because of the various entries) whereas in the previous system, there was only one entry. Comments can be entered during the Action on many of the infotypes (for example 0000, 0019, 2001). Also, you can run reports based on reasons. Take, for example, an SAP employee who is going on an 18-month military leave. At the end of his or her orders, the employee volunteers for an additional six months. In OSC HR/Payroll, four LOA entries, with applicable reasons, would be required to record the leave history:

1. LOA Action – reason-use either: Reserve Active Duty (Leave) or Reserve Active Duty (Lump Sum)—depending upon whether or not the employee will use leave or will be paid for leave prior to the 30 days paid by the State.
2. LOA Action - reason: Reserve Active Duty (30 days).
3. LOA Action – reason: Reserve Active Duty (entered on the 31<sup>st</sup> day of duty).
4. LOA Action – reason: Extended Military (entered after the employee's original orders were completed and the employee volunteered for additional duty)--granted for all uniformed service duty that is not covered by military leave with pay as defined by policy for active/inactive duty training, physical exams, and reserve active duty.

**ZPAA076 - Workflow**

1st

2nd

For LOA, both "Current" and "Proposed" columns are pre-populated, except salary.

Do not use Last day worked field for LOA (only for Separation Pay Continuation and Separation)

SLIDE 19

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## Notes:

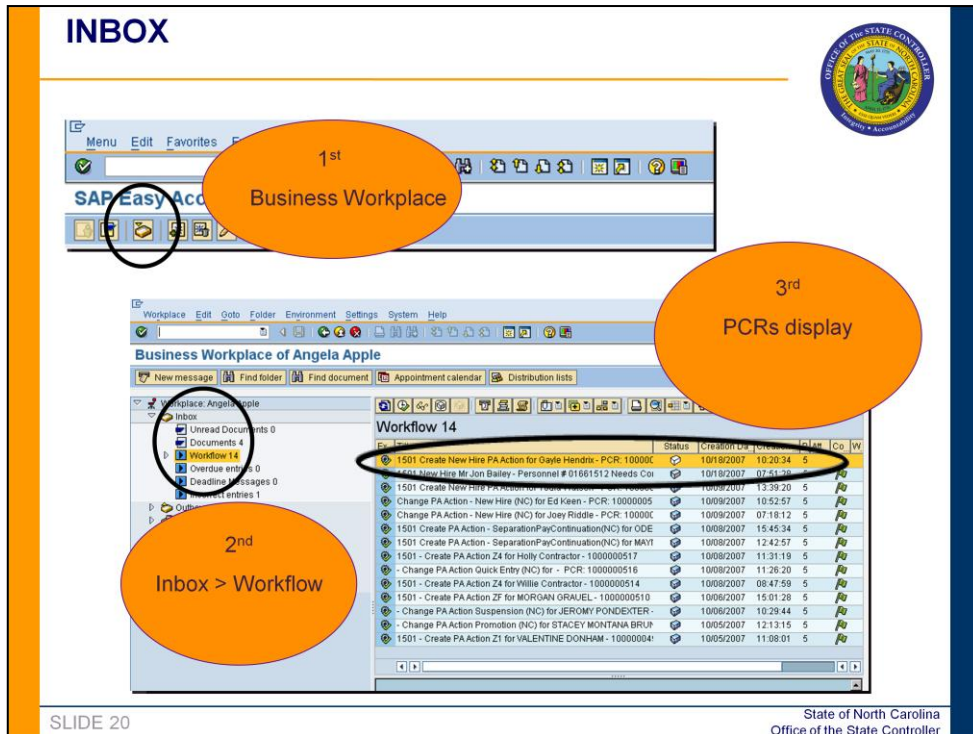
All Leave of Absence Actions must be initiated using transaction code ZPAA076.

As indicated in *PA310 Create and Maintain Employee Data*, transaction code **ZPAA076** is the OSC HR/Payroll SAP electronic approval process, referred to as Workflow (WF).

On the initial *Employee Action Request* screen enter the applicable data. After the Action type and Reason is entered, the second *Employee Action Request* screen is displayed. This screen has two columns. The left column displays the current status of the employee. On the right, enter the salary information.

When you initiate Workflow, you will receive a Personnel Change Request (PCR) number. Be sure to make a record of the PCR number so that you can track it.

After all the data is entered and WF is initiated, OSC HR/Payroll SAP sends the request to the appropriate Approver who can approve or reject the request (there may be more than one level of approval).



SLIDE 20

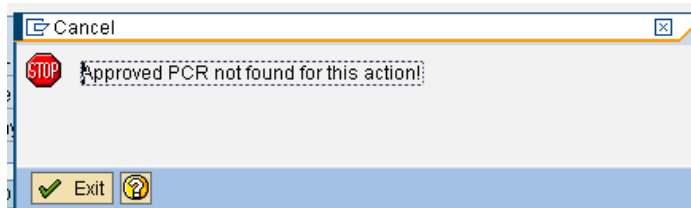
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## Notes:

The second part of the Workflow is to see if your Workflow item has been approved or rejected. Go into the SAP Business Workplace from the Easy Access screen.

From the Business Workplace screen, click Inbox > Workflow. All the approved or rejected PCRs that you have initiated are listed on the right. Double-click the approved PCR and the applicable screen automatically displays for the Action. You are now ready to execute the appropriate Action.

Workflow is always the first step before you initiate an Action. You do not use Workflow for PA 30 transactions. If you are ever in doubt whether Workflow is needed, access the Personnel Actions screen using PA40. If the Action is on the list, it must be processed through Workflow. If you attempt to bypass Workflow for an Action, you will receive the error message below and not be allowed to continue.



## LOA Infotypes



The following infotypes are presented in a Leave of Absence Action:

- Personnel Actions IT0000
- Create Organizational Assignment IT0001
- Create Monitoring of Tasks IT0019
- Delimit Objects on Loan IT 0040
- Planned Working Time 0007
- Absences IT2001
- Time Quota Compensation IT0416

SLIDE 21

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## Notes:

When you create an Action (such as LOA) OSC HR/Payroll presents the applicable infotypes. The LOA infotypes are listed above and discussed on subsequent pages. You may or may not need to enter data in all of them, depending upon the circumstances of the leave you are processing.

As indicated in previous courses, you should always save a pre-populated infotype that is part of an Action, even if you do not enter or change the data.

Actions 0000

CP

Infotype Edit Goto Extras System Help

Copy Actions (0000)

Execute info group Change info group

Pers No80000172

NameRose Brown08

EEGroupA

SPA Employees

PersA4601

Cultural Resources

EESubgroupB1

FT S-FLSAOT Perm

Start05/11/2009

to12/31/9999

Personnel action

Action Type23 Leave of Absence (NC)

Reason for Action19 S/T Disability 60 Day w/Period

Status

Customer-specific

Employment3 Active

Special payment1 Standard wage type

Organizational assignment

Position65001923

Docent Coordinator

Personnel area4601

Cultural Resources

Employee groupA

SPA Employees

Employee subgroupB1

FT S-FLSAOT Perm

Additional actions

Start Date	Act	Action Type	ActR	Reason for action

SLIDE 22

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Notes:


The **Actions 0000** infotype indicates the events that occurred on the employee’s personnel record. The infotype shows the employment status (Active, Inactive, Withdrawn). Time, Payroll and Benefits use information from IT000.

The information on this infotype should pre-populate based on the data you entered when initiating Workflow ZPAA076. **Save** the infotype.

V1\_121009

Page 22

Organizational Assignment 0001



Infotype Edit Goto Extras System Help

Create Organizational Assignment (0001)

Org Structure

Personnel No80000172

EEGroupA SPA Emp

EESubgroupB1 FT S-FLSA

Start05/11/2009

Enterprise structure

CoCodeNC01 STAT

Pers area4601 Cultural Re

Cost Ctr4699999999 CULTURE RESOURCE Bus. Area4600 Cultur

Func. Area

Personnel structure

EE groupA SPA Employees

EE subgroupB1 FT S-FLSAOT Perm

Payr. area01 NC Monthly

Contract

Organizational plan

Percentage100.00

Position65001923 800904000340

Job key30001535

Org. Unit20010125 46010101020

Org. key

Assignment

Decent Coordinator

His Intpr

Historic Interpreter III

CR CDS CABSEC Bds &

Use the Contract field for LOA when employee is going on Short-Term Disability and has fewer than 5 years of service for retirement.

SLIDE 23

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Organizational Assignment 0001


Save the infotype.

Time, Payroll and Benefits pull information from **Organizational Assignment** IT0001. All of the fields on this infotype default from the position assigned to the employee.

The Contract field is only used for LOA for Short-Term Disability (discussed in *PA370 Short Term Disability*). For example, if the leave is for Short-Term Disability, it is necessary to use the Contract field to indicate that the employee has fewer than five years of service for retirement. This determines if the health insurance will be paid partially by the State or solely by the employee. For STD LOA, if the employee has five or more years of service for retirement, leave the field blank.

Notes:

Monitoring of Tasks 0019



Infotype Edit Goto Extras System Help

Create Monitoring of Tasks (0019)

Personnel No 80000172

EEGroup A SPA Employee

EESubgroup B1 FT S-FLSAOT Perm Statu Active

Task

Task Type

Date of Task ☒ Processing indicator New task

Reminder

Reminder Date

Lead/follow-up time

Comments

SLIDE 24

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Monitoring of Tasks 0019

Notes:

This infotype is like a tickler file and is date-driven. Select an applicable task type and enter a date that a task is due.

To keep track of the various tasks, run either the Date Monitoring report (S\_PH0\_48000450 in SAP or B0099 in BI) to view the various tasks due for a week. If the task is completed prior to the due date, it will still display on the reports unless you delimit the Monitoring of Tasks infotype.



Objects on Loan

Infotype Edit Goto Extras System Help

Delimit Objects on Loan (0040)

Personnel No80000172NameRose Brown08

EEGroupASPA EmployeesPersA4601Cultural Resources

EESubgroupB1FT S-FLSAOT PermStatuActive

Choose05/11/2009To12/31/9999STyDelimit Date05/11/2009

Overview

Start Date	End Date	Object on loan	Name	No.	Loan object number
01/01/2008	12/31/9999	01	State ID		15551317

SLIDE 25

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Notes:

Objects on Loan 0040

Either skip or delimit depending upon whether or not (1) your agency uses this infotype (2) your agency requires employees to return items while out on leave, or (3) the employee returned items if required to do so.

V1\_121009

Page 25

Create Planned Working Time Infotype

Infotype Edit Goto Extras System Help

Copy Planned

Personnel No 8

EEGroup A

EESubgroup A1

Start 04

Work schedule rule

Work schedule rule D01N08GN MTWHF-8,SaS-O

Time Mgmt status 1 1 - Positive Time Recording

Working week 06 Wk - Sat (mdnt) - Fri

☐ Part-time employee

Working time

Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00
Weekly workdays	

Full-time: place on D01N08GN or applicable 5 X 8 schedule.

Part-time: place on appropriate PT schedule.

Both FT and PT must be Positive Time Recording

SLIDE 26

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Notes:

**Planned Working Time 0007**

All full-time employees must be on a 5 day 8 hour per day work schedule. The easiest way to accomplish this is to use **D01N08GN**. Part-time employees can be kept on their applicable part-time schedule.

**All employees**, whether full-time or part-time, must be positive time recording.

When you reinstate an employee, the 0007 infotype displays as part of the Reinstatement Action as well. You will at that time assign the employee to the applicable full-time or part-time work schedule, and also change the Time Mgmt Status field back to negative time if the employee was negative time prior to LOA.

Subtypes for Absences Pop-up

PSG A/Aty	Att.abs. type text
10 9000	Approved Leave
10 9200	Sick Leave
10 9300	Holiday Leave
10 9400	Leave without Pay
10 9540	Other Mgmt Approved Leave
10 9545	Adverse Weather
10 9547	Communicable Disease
10 9550	Civil Leave - Jury Duty
10 9560	Community Service Leave
10 9565	Community Svc-Tutoring
10 9570	Educational Leave
10 9620	Military Training Leave
10 9630	Military Active Duty
10 9680	Injury Absence WC
10 9685	Injury Leave

SLIDE 27

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**Notes:**

**Subtypes for Absences**

Use the applicable leave type to indicate if the employee is to receive pay and if so from which type. Another option is to indicate that the employee is not to accrue leave or longevity while on unpaid leave. The codes are selected as follows:

- If the employee has requested to use leave while on LOA, select the appropriate type from the list.
- If the employee is on unpaid leave and the employee’s longevity or leave balances are to be stopped, select code 9400 (not applicable for Military and Workers Comp leave).
- If the employee is not using leave and code 9400 is not applicable, click the X to close.

**Codes**

It is important to select the code that corresponds to the Reason selected for the LOA Action. For example:

- 9620 – used when placing the employee on LOA Action with a Reason of Extended Military
- 9630 –used when placing the employee on LOA Action with a Reason of Reserve Active Duty (30 days)
- 9680 – used when employee has returned to work from WC but needs to see doctor or go to rehab related to injury on job
- 9685 – used when placing the employee on LOA Action with a Reason of Injury Leave

**Absences 2001**

SLIDE 28

State of North Carolina  
Office of the State Controller

**Notes:**

**Absences 2001**

The Absences infotype only displays if you selected a leave type from the subtype for Absences pop-up (see previous page).

The Absences infotype (2001) indicates the number of hours the employee wants to use for leave and deducts from the leave quotas as applicable. If the employee is not supposed to accrue leave or longevity while on unpaid leave, IT2001 with code 9400 should be entered (see State policy regarding accrual and longevity exceptions for Workers' Comp, law enforcement and military leave). The hours that default are based on IT0007-Planning Working Time and the dates that are used on the infotype:

- The “start” date should automatically pre-populate based on the effective date of the LOA Action.
- Enter the “to” date to reflect the number of hours of leave the employee wants to use (or for code 9400 if unpaid leave). Never enter 12/31/9999 as the “to” date.

**NOTE:** An agency can make an agency-wide (not individual user) decision that LOA leave can either be entered on a timesheet by the Time Administrator or by HR on IT2001. The agency must be consistent across all employees for the entire agency. Because OSC HR/Payroll is integrated, if the hours are entered on the Absences infotype 2001, they are processed during the next time evaluation. A time sheet **should not** be created.

### Absences (2001) Example with Holidays

**#1** Enter leave dates up to the holiday on the original LOA

**Change Absences (2001)**

Personnel No: 31005009 Name: Daniel Boone  
 EE group: A SPA Employees Personnel ar: 1601  
 WS rule: D01N08GN MTWTF-S SaS-O  
 Start: 12/18/2007 To: 12/23/2007 Chg: 12/21/2007

Absence type: 9000 Approved Leave  
 Time: -  
 Absence hours: 32.00 ☐ Prev day ☒ Full-day  
 Absence days: 4.00  
 Calendar days: 6.00  
 Quota used: 32.00 Hours

**#2** On a PA 30, enter first holiday dates

**Display Absences (2001)**

Personnel No: 31005009 Name: Daniel Boone  
 EE group: A SPA Employees Personnel ar: 1601  
 WS rule: D01N08GN MTWTF-S SaS-O  
 Start: 12/24/2007 To: 12/26/2007 Chg: 12/21/2007

Absence type: 9300 Holiday Leave  
 Time: -  
 Absence hours: 24.00 ☐ Prev day ☒ Full-day  
 Absence days: 3.00  
 Calendar days: 3.00  
 Quota used: 24.00 Hours

**#3** On a PA30, enter leave dates up to the next holiday

**Display Absences (2001)**

Personnel No: 31005009 Name: Daniel Boone  
 EE group: A SPA Employees Personnel ar: 1601  
 WS rule: D01N08GN MTWTF-S SaS-O  
 Start: 12/27/2007 To: 12/31/2007 Chg: 12/21/2007

Absence type: 9000 Approved Leave  
 Time: -  
 Absence hours: 24.00 ☐ Prev day ☒ Full-day  
 Absence days: 3.00  
 Calendar days: 5.00  
 Quota used: 24.00 Hours

continued

SLIDE 29

State of North Carolina  
Office of the State Controller

### Notes:

If the employee is using leave during a time that includes a holiday, additional 2001 infotypes will be necessary to allow the employee to take holiday leave. The additional 2001 records are created in transaction PA30. For example, assume an employee is going out on military leave on December 18 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there are two holiday periods (12/24 – 12/26 and 1/1/2008). Your entries would be as follows:

1. During the LOA Action, on the Absences (2001) infotype, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:

Start: 12/18/2007      To: 12/23/2007 (32 hours **leave**)

By entering the dates above, the system calculates that four working days fall within the date range. The D01N08GN work schedule on IT0007 that was created issues a 5 X 8 work schedule for the employee; therefore, 32 hours default into the Absence hours field.

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

Start: 12/24/2007      To: 12/26/2007 (24 hours **holiday**)

### Absences (2001) Example with Holidays (cont.)

#### Display Absences (2001)

**#4** On a PA30, enter the holiday leave dates

Personnel No.	31005009	Name	Daniel Boone
EE group	A SPA Employees	Personnel ar	1601
WVS rule	001N006N MTWTFSS SaS.O	Stab	
Start	01/01/2008	To	01/01/2008

Absence type	9300	Holiday Leave	
Time		<input type="checkbox"/> Prev day	<input checked="" type="checkbox"/> Full-day
Absence hours	8.00		
Absence days	1.00		
Calendar days	1.00		
Quota used	8.00	Hours	

#### Copy Absences (2001)

**#5** On a PA30, enter the remaining leave dates

Personnel No.	31005009	Name	Daniel Boone
EE group	A SPA Employees	Personnel ar	1601
WVS rule	001N006N MTWTFSS SaS.O	Stab	
Start	01/02/2008	To	01/20/2008

Absence type	9000	Approved Leave	
Time		<input type="checkbox"/> Prev day	<input checked="" type="checkbox"/> Full-day
Absence hours	104.00		
Absence days	13.00		
Calendar days	19.00		
Quota used	104.00	Hours	

SLIDE 30

State of North Carolina  
Office of the State Controller

### Notes:

3. Create a PA30 to enter the next leave period **up to** the next holiday, infotype 2001, subtype 9000:  
 Start: 12/27/2007      To: 12/31/2007 (24 hours **leave**)
4. Create a PA30 to enter the next holiday period, infotype 2001, subtype 9300:  
 Start: 01/01/2008      To: 01/01/2008 (eight hours **holiday**)
5. Create a PA30 to enter the remaining leave, in this case 104 hours, infotype 2001, subtype 900:  
 Start: 01/02/2008      To: 01/20/2008 (104 hours **leave**)

By entering the data on the Absences infotype as explained in this manner, it is not necessary for a separate time sheet to be entered for the employee. If data is not entered on this infotype (nor a timesheet), the employee is on leave without pay.

**Using leave accrued while out on leave:** If an employee wants to use the time that was accrued while he or she was out on paid leave, you will have to create a new PA30 IT2001 in order to enter the new leave time. For example: An employee has 160 hours of approved leave. When the employee goes out on LOA, he/she wants to use the 160, plus the hours that are accruing while on leave. In this case, you would enter the 160 hours on infotype 2001 during the Action. After the employee has accrued the additional hours, you would create a PA30 for another 2001 to exhaust the additional leave.

## Subtypes for Time Quota Compensation Pop-up



Subtypes for infotype "Time Quota Compensation" (1) 7 Entries

Restrictions

ESG	PSG	Comp.me	Description
1	10	1000	Free compensation
1	10	2001	Vacation Payout
1	10	2002	Bonus Payout
1	10	2003	Comp Time Payout
1	10	2004	Hol Comp Payout
1	10	2005	Sick Payout (WC only)
1	10	2006	On Call Comp Payout

7 Entries found

SLIDE 31

State of North Carolina  
Office of the State Controller

### Notes:


#### Subtypes for Time Quota Compensation

An employee can only request a lump sum (one time) payment of leave during a Military LOA or Short-Term Disability LOA.

Select the applicable leave type if the employee has requested a lump sum (one time) payment of leave instead of receiving it via regular pay disbursement. The employee cannot request leave both via regular pay disbursement (entered by HR on IT2001) and lump sum payment at the same time.



## Time Quota Compensation



Infotype Edit Goto Extras System Help

Create Time Quota Compensation (0416)

Personnel No. 00000170 Name  
 EE group A SPA Employees Personne  
 WS rule 001N086N MTWHF-8,SaS-O  
 Start 06/04/2009

Comp. method 2001 Vacation Payout

Compensation specifications  
 Time quota type 10 Vacation Leave  
 Compensation rule 000  
 No. to compensate  
☐ Do not account

NOTE: Enter the hours to be paid out.  
 NOTE: The hours entered cannot exceed the hours for the applicable leave type shown in the Rem. column.

ATy	Quota text	Entitl	Unit	Comp.	Rem.	WT	Amount	Curre	Deduction fr.	Deduction to
10	Vacation Leave	93.96000	Hours	0.00000	93.96000		0.00		04/15/2008	12/31/9999
15	Sick Leave	96.00000	Hours	0.00000	96.00000		0.00		04/15/2008	12/31/9999
40	Holiday Leave	8.00000	Hours	0.00000	8.00000		0.00		01/01/2008	03/02/2008
40	Holiday Leave	8.00000	Hours	0.00000	8.00000		0.00		02/20/2008	04/21/2008
40	Holiday Leave	24.00000	Hours	0.00000	8.00000		0.00		12/02/2008	12/31/9999
65	Community Service Leave	24.00000	Hours	0.00000	24.00000		0.00		01/01/2008	12/31/2008
65	Community Service Leave	24.00000	Hours	0.00000	24.00000		0.00		01/01/2009	12/31/2009

SLIDE 32

State of North Carolina  
Office of the State Controller

## Notes:

### Time Quota Compensation 0416

This infotype only displays if you selected a leave category from the subtypes popup (see previous page). If you did make a selection on the subtypes popup, that leave type pre-populates on the Time Quota Compensation infotype.

The date defaults from the Action. **Do not** change the date on this infotype (like you do in a Separation or Separation Pay Continuation).


The number of hours that the employee is entitled to for that leave type category defaults in the Rem. Column. That is why it is critical to ensure that all time has been entered, approved, released and that time evaluation has run before entering the LOA Action.

### Multiple Leave Types

If the employee has indicated a request for lump sum payment and has more than one type to be paid, you must use PA30 after you complete the LOA Action to select and enter the additional subtypes for IT0416.



## EE HR Overview (ZEMP)



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### EE HR Overview

As Of: 09/21/2009
Run Date: 09/21/2009

<b>Employee Data</b> PERNR: 80000326 EE Name: Kumar, Reinaldo01 Employment St: Active Personnel Area: Cultural Resources EE Group: SPA Employees EE Subgroup: FT N-FLSAOT Perm Personnel Subarea: 7day Norm Ann Sal/Hr Rate: \$35,500.00 PS Group: GR68      Level: GR Cap. util. lvl: 100.00      WkHrs/Pd: 173.33 Monthly DOB: 08/28/1956      Gender: F Ethnic Origin: White (Non-Hispanic/Latino) Disability: None/Prefer not to report Military Status: Reserve Veteran Status: Non-Veteran State EOD: 01/01/2008      Agency EOD: 01/01/2008 Length of Service: 000 Mths Est Long Due Date: 03/2010	<b>Position Data</b> Position: 65001574 - Historic Sites Specialist II Job: 30001542 - Historic Sites Specialist II Supervisor: 80000124 - Jessica Hunter Org Unit: 20010130 - CR CDS Eastern Region Representative EE Group: SPA Employees EE Subgroup: FT N-FLSAOT Perm Personnel Subarea: 7day Norm Budgeted Salary: \$35,500.00 Exempt Status: No
---	--

<b>Latest EE Action &amp; Salary Changes:</b> Most Recent Actn: New Hire (NC) Reason: New Hire Action Date: 01/01/2008 Amt Last Sal Chg: \$0.00 Salary Chg Date: 01/01/2008	<b>Time Data</b> Time Management St: 1 - Positive Time Recording Working Week: 07 - Wk - Sun (adnt) - Sat Work Schedule Rule: D01ND08N - MTWTF-8, SaS-0 OT Comp: Y      365      Holiday Payout: Y 365 Extended Duty: N      0.00      Holiday Premium: 50% Callback: N      0.00      EV Premium: N 00% On-Call: N      0.00      WK Premium: N 00% Gap Hrs: N      000      NS Premium: N 00%
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Disclaimer: Not for Public Information

SLIDE 33
State of North Carolina  
Office of the State Controller


**Notes:**

The Employee Overview screen is a “snapshot” of an employee’s information.

The transaction is initiated by entering data to define who and what time frame an HR user needs to view a particular employee’s information.

1. Enter **ZEMP** in the **Command** field on the **Easy Access** screen and press the **Enter** key or click the green check ball.
2. Enter an Employee ID.
3. The current date defaults into the Selection Date field. You have the option to enter any date that the employee has data in the system. If you enter a date that is not valid, you receive the message ‘No Information for the date Entered’. If you are not authorized, you will receive a message indicating that you do not have authorization.
4. Click the **Execute** button to perform the transaction.

## EE Infotype Overview (pc00\_m02\_linf0)



**Infotype Overview**

80000286 Janet Thomas01

- 0000 Actions
- 0001 Organizational Assignment
- 0002 Personal Data
- 0003 Payroll Status
- ▾ 0006 Addresses
  - 1 Permanent residence
  - 4 Emergency contact
  - 5 Mailing address
- 0007 Planned Working Time
- 0008 Basic Pay
- ▾ 0009 Bank Details
  - 0 Main bank
- 0040 Objects on Loan
- 0041 Date Specifications
- 0077 Additional Personal Data
- 0094 I-9 Residence Status
- 0105 Communication
- 0128 Notifications
- 0167 Health Plans
- 0171 General Benefits Information
- 0207 Residence Tax Area
- ▾ 0208 Work Tax Area
  - NC State of North Carolina
- 0209 Unemployment State
- 0210 Withholding Info W4M5 US
- 0302 Additional Actions
- 0315 Time Sheet Defaults
- 0378 Adjustment Reasons
- 0552 Time Specification/Employ. Period
- 2006 Absence Quotas

SLIDE 34
State of North Carolina  
Office of the State Controller

## Notes:

The EE Infotype Overview is a transaction screen that lists all active infotypes for an employee during a specified period of time.

Enter the Transaction Code PC00\_M02\_LINF0 in the Command field and press or click Enter. Make the necessary selections (personnel number and validity dates). Click “execute.”

You can expand or collapse any and all of the infotypes.

To see the detail of a specific infotype (e.g. IT0001), double-click the infotype or select it and click at the top of the screen. The system will display the detail screen (same as *PA20 – Display Master Data*). You may click the green back arrow to return to the EE Infotype Overview screen.

### Lesson Review



In this lesson you learned to:

- Describe the checklist tasks you should perform before entering a Leave of Absence (LOA) Action
- Identify the transaction code and various infotypes associated with an LOA
- Describe the interaction of the infotypes within the LOA Action and with the Time, Benefits, and Payroll modules
- List the reasons associated with an LOA Action
- Describe the FMLA steps that are not part of the LOA Action


SLIDE 35

State of North Carolina  
Office of the State Controller

**Notes:**

## Course Map

- Lesson 1: Leave of Absence (LOA) Overview
- Lesson 2: Creating a Leave of Absence**
- Lesson 3: Reinstating an Employee from LOA
- Lesson 4: Benefits and Leave of Absence
- Lesson 5: Course Review



SLIDE 36

State of North Carolina  
Office of the State Controller

**Notes:**

### Lesson Objectives



Upon completion of this lesson, you should be able to:

- Determine the appropriate reason for a LOA (Leave of Absence) Action
- Enter the data to initiate and complete a Leave of Absence for various reasons
- Run the Date Monitoring Report

SLIDE 37

State of North Carolina  
Office of the State Controller

**Notes:**

## Instructor Demonstration



In this demonstration, the Instructor will:

- Create a FMLA LOA for Janet Thomas

Action	Reason and Definition	Employment Status
LOA – used when an employee is out of work on paid or unpaid leave.	<ul style="list-style-type: none"> <li>FMLA – employee is out for a reason that qualifies for FMLA.</li> <li>Family Illness Leave – employee is out due to having to take care of immediate family members and the employee chooses to not use FMLA.</li> <li>Extended Illness – employee illness that is not covered by FMLA or short term disability.</li> <li>Reserve Active Duty (leave) – employee is exhausting vacation, bonus or comp time prior to RAD 30 day leave.</li> <li>Reserve Active Duty (lump sum) – employee is paid for vacation, bonus or comp time prior to RAD 30 day leave.</li> <li>Reserve Active Duty (30 days) – employee is placed on RAD 30 days with Active Duty orders (calendar days).</li> <li>Reserve Active Duty – employee is placed on RAD Active Duty on 31<sup>st</sup> day.</li> <li>W/C 7 day waiting period – employee waiting period before workers' compensation begins payment.</li> <li>W/C Leave of Absence whiplamert – employee is placed on this WC on 8<sup>th</sup> day of workers' comp and is exhausting eligible sick leave hours during WC leave (see OSP schedule for eligible hours).</li> <li>W/C Leave of Absence – employee is placed on Workers' Compensation.</li> <li>W/C LEO Continuation Pay – employee is a law enforcement officer being placed on Workers' Compensation with Continuation Pay up to 2 years.</li> <li>W/C Correctional Officer (Custody) – employee is placed on Workers' Compensation (only for Correctional Officers).</li> <li>Injury Leave – employee is injured by a direct and deliberate act of an offender/inmate supervised by Department of Correction, or an employee (teacher) in any educational institution supported by and under the control of the State, see GS 115C-338 for details.</li> <li>Education – employee is on leave to go back to school.</li> <li>Short-Term Disability 60 day waiting period – to track waiting period regardless if paid or unpaid.</li> <li>Short-Term Disability (Leave) – employee is using leave during short-term disability.</li> <li>Short-Term Disability (lump sum) – employee is paid out for leave in one payment.</li> <li>Short-Term Disability Regular – employee is placed on this reason on the 61<sup>st</sup> day if not using leave.</li> <li>Short-Term Disability Extended – employee is extended beyond 12 months.</li> </ul>	Active



SLIDE 38

State of North Carolina  
Office of the State Controller

## Notes:

### Exercise 2.1



#### LOA – FMLA

Janet Thomas is a permanent employee who works at the Department of Commerce. She has the following leave balances: 240 sick and 240 vacation. Effective today, she is going out on FMLA due to her husband's serious medical condition. She expects to be out for a total of 12 weeks.

Janet has not indicated that she wishes to use any of her leave for this LOA.

Initiate Workflow to begin the process.



SLIDE 39

State of North Carolina  
Office of the State Controller

### Notes:

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

## Exercise 2.2



- LOA Military
- Ray Cryar has been given orders to report the first day of next month for 120 hours of military training. According to PT50, Ronald does not have 120 military training left. That means that Ronald will have to either go on some hours of unpaid leave or use his accrued leave for the remaining hours. Ronald has decided to use vacation. You will have to determine how many hours vacation to use and then process the leave accordingly.

Action	Reason and Definition	Employment Status
LOA – used when an employee is out of work on paid or unpaid leave.	<ul style="list-style-type: none"> <li>• Reserve Active Duty (leave) – employee is exhausting vacation, bonus or comp time prior to RAD 30 day leave.</li> <li>• Reserve Active Duty (lump sum) – employee is paid for vacation, bonus or comp time prior to RAD 30 day leave.</li> <li>• Reserve Active Duty (30 days) – employee is placed on RAD 30 days with Active Duty orders (calendar days)</li> <li>• Reserve Active Duty – employee is placed on RAD Active Duty on 31<sup>st</sup> day.</li> <li>• W/C 7 day waiting period – employee waiting period before workers' compensation benefit payment.</li> <li>• Extended Military – Granted for all uniformed service duty that is not covered by military leave with pay as defined by policy for active/inactive duty training, physical exams, and reserve active duty.</li> </ul>	Active



SLIDE 40

State of North Carolina  
Office of the State Controller

## Notes:

It is important to understand the various reasons associated with military LOA:

**Reserve Active Duty (Leave)** – the employee wants to use leave while on military LOA. According to policy, this must be used prior to the 30 days for which the State pays.

**Reserve Active Duty (30 days)** – the State pays for 30 days when the employee receives orders.

**Reserve Active Duty** – the employee has completed the 30 days for which the State is paying.

**Reserve Active Duty (Lump Sum)** – the employee has requested to receive a one-time lump sum payment for leave used. Employee must choose either lump sum or leave, not both at the same time.

**Reserve Active Duty Extended** - Granted for all uniformed service duty that is not covered by military leave with pay as defined by policy for active/inactive duty training, physical exams, and reserve active duty.



Worker's Compensation		
Action	Reason and Definition	Employment Status
LOA – used when an employee is out of work on paid or unpaid leave.	<ul style="list-style-type: none"> <li>W/C 7 day waiting period – employee waiting period before workers' compensation begins payment.</li> <li>W/C Leave of Absence w/supplement – employee is placed on this WC on 8<sup>th</sup> day of workers' comp and is exhausting eligible sick leave hours during WC leave (see OSP schedule for eligible hours)</li> <li>W/C Leave of Absence – employee is placed on Workers' Compensation.</li> <li>W/C LEO Continuation Pay – employee is a law enforcement officer being placed on Workers' Compensation with Continuation Pay up to 2 years.</li> <li>W/C Correctional Officer (Custody) – employee is placed on Workers' Compensation (only for Correctional Officers).</li> <li>Injury Leave – employee is injured by a direct and deliberate act of an offender/inmate supervised by Department of Correction, or an employee (teacher) in any educational institution supported by and under the control of the State, see GS 115C-338 for details.</li> <li>Education – employee is on leave to go back to school.</li> <li>Short-Term Disability 60 day waiting period – to track waiting period regardless if paid or unpaid.</li> <li>Short-Term Disability (Leave) – employee is using leave during short-term disability.</li> <li>Short-Term Disability (lump sum) – employee is paid out for leave in one payment.</li> <li>Short-Term Disability Regular – employee is placed on this reason on the 61<sup>st</sup> day if not using leave.</li> </ul>	Active

SLIDE 41

State of North Carolina  
Office of the State Controller**Notes:**

Observe that some Worker's Compensation reasons are specific to a particular category of employee. For example:

- W/C LEO Continuation Pay is only used when a bonafide law enforcement officer (not just a law enforcement employee) is injured and being placed on pay continuation. The law enforcement officer is entitled to two years of pay continuation before going out on Worker's Comp.
- WC Correctional Officer (Custody) is only used for correctional officers who are going out on Worker's Comp.

It should be noted that Injury Leave is a reason for LOA and is part of a Worker's Comp case. Enter the LOA for Injury Leave first, and, when necessary, enter a second LOA for Worker's Comp. Injury Leave is used as a reason in very specific circumstances:

- An employee is injured by a direct and deliberate act of an offender/inmate supervised by Department of Correction, or an employee (teacher) in any educational institution supported by and under the control of the State, see GS 115C-338 for details.

### Exercise 2.3



#### LOA – Worker's Compensation

Patricia Calloway is a permanent employee at Cultural Resources as an Archaeologist II with the following leave balances:

- 200 bonus
- 600 sick leave
- 80 vacation

Patricia was injured on the job while performing her duties and will probably be out of work for a few months. She wants to use 40 hours of vacation during her 7-day waiting period. She is entitled to and wants to receive 2 hours per week of supplemental pay during the six month period.

Initiate Workflow to begin the process.



State of North Carolina  
Office of the State Controller

SLIDE 42

### Notes:

#### **When the 7 days are consecutive**

The day the injury occurred is not counted as part of the 7-day waiting period. You may or may not include the weekends (see Weekend section below).

#### **When the 7 days are not consecutive**

If an employee takes the 7 days waiting period in non-consecutive days, you will enter several LOA Actions. See the explanation in the *Exercise Guide* on how to process the 7-day waiting period when it is used in non-consecutive days.

#### **When to include weekends**

If the doctor's note takes the employee out on Friday and indicates the employee can return on Monday, you would count the weekend as part of the 7-day waiting period. However, if the employee gets hurt early in the week, but is back at work on Friday, then out again on Monday, you would not count the weekend.

#### **On the 8<sup>th</sup> day**

If the employee is still out after the 7-day waiting period, you will create a new LOA Action on the 8<sup>th</sup> day using the applicable WC reason.

### Exercise 2.4



#### LOA – Military

Kumar Reinaldo is a permanent employee at Cultural Resources. He has the following leave balances:

– 150 hours of vacation – 200 bonus – 120 sick

He received active duty orders for 18 months. He is not eligible for differential pay. He wants to use a combination of vacation, bonus and holiday (160 hours) leave, therefore those hours are entered before he can begin receiving the 30 days the State pays.

In this scenario, a holiday is included in the time frame for which he wants to use leave. Therefore, you will enter the approved leave on the original LOA **up to** the date of the holiday, and then do a PA30 to enter the holiday and another PA30 to enter the remaining leave dates.

Initiate Workflow to begin the process.



SLIDE 43

State of North Carolina  
Office of the State Controller



### Notes:

**Differential pay:** If an employee is eligible for differential pay, it is paid through Payroll (not by Accounts Payable). Therefore, you must coordinate with your Agency Payroll Office to ensure that you send them the appropriate paperwork so the employee is paid his or her differential while out on military leave.

**Processing LOA military 30 days when employee also wants to use leave:** According to the State Personnel Manual, you should enter the military 30 days (LOA – reason: 09 – Military Active Duty [30 days] after you enter the hours the employee wants to use for leave (LOA – reason: 10 – Reserve Active Duty [Leave]) . Failure to create the LOA, Military Active Duty (30 days) with the accompanying IT2001 results in the employee not receiving the military pay.

## Exercise 2.5

Run the Date Monitoring Report



SLIDE 44

State of North Carolina  
Office of the State Controller

### Notes:

The Date Monitoring Report can be run from the SAP Easy Access screen via the following menu:

Select SAP menu > Human Resources > Personnel Management > Administration > Infosystem > Reports > Employee > Date Monitoring (S\_PH0\_48000450).

In addition, you can run a report on due tasks in BI. The report, B0099 – Employee Deadline Dates (illustrated below).

### Lesson Review



In this lesson, you learned to:

- Determine the appropriate reason for a LOA (Leave of Absence) Action
- Enter the data to initiate and complete a Leave of Absence for various reasons
- Run the Date Monitoring Report


SLIDE 45

State of North Carolina  
Office of the State Controller

**Notes:**

## Course Map

- Lesson 1: Leave of Absence (LOA) Overview
- Lesson 2: Creating a Leave of Absence
- Lesson 3: Reinstating an Employee from LOA**
- Lesson 4: Benefits and Leave of Absence
- Lesson 5: Course Review



SLIDE 46

State of North Carolina  
Office of the State Controller

**Notes:**

### Course Objectives



Upon completion of this course, you should be able to:

- Reinstatement of an employee from Leave of Absence

SLIDE 47

State of North Carolina  
Office of the State Controller

**Notes:**

### Exercise 3.1



#### Reinstatement

Assume today is six months since the effective date that Patricia Calloway (the same employee in 2.2 Exercise) began her LOA. She has fully recovered and is released to return to work. Reinstatement Patricia from LOA.

Initiate Workflow to begin the process.



SLIDE 48

State of North Carolina  
Office of the State Controller

### Notes:

**Date Specifications infotype when you are reinstating LOA employee.** Observe that when you return an employee from LOA, on the Date Specifications infotype (0041), the agency date automatically populates to the date of the Action. Review the Agency date and adjust it per your Agency's process. With the exception of Judicial and Lottery, longevity is not associated with IT0041.



### Returning from WC less than full time

**Scenario**  
Full-Time employee returns to work for 4 hours; is paid by WC the other 4 hours.

**DO NOT ADJUST IT0008!**


- Action: Reinstatement/Reemployment Workflow (ZPAA076)
  - Reason: **Return from WC Trial Rehab or Complete (per agency)**
- After approval is received, execute Personnel Action and applicable infotypes:
  - IT000 Actions – Save
  - IT0001 Org Assignment – Save
  - IT0041 Date Specifications – Save
  - IT0040 Objects on Loan – Save or Add Objects on Loan depending upon whether you delimited objects on LOA Action
  - IT0007 Planned Working Time – It should be pre-populated accurately from the Action. Review to ensure D01N08GN work schedule and **positive time**. Do not select the “part-time” box.

Employee enters:

- 9400 for 4 hours not worked (or 9680 for WC-related appointments, rehab etc.)
- 9500 for 4 hours worked

Leave Administrator adjusts holiday quotas as required

PA30 IT0019 – reminder for new LOA when going back to full-time



SLIDE 49

State of North Carolina  
Office of the State Controller

### Notes:

Use the above method to reinstate a full-time employee from Worker's Comp trial rehab who is working less than 40 hours per week. Using this method allows the employee's benefits to be kept whole, whereas changing the employee to part-time impacts benefits.

### **Reinstate an FT employee from WC trial rehab working less than 40 hours:**

1. Enter a Reinstatement Action with WC Trial Rehab as the reason on the appropriate effective date.
2. During the Action when IT0007 displays, the information should default from the LOA Action (D01N08GN and positive time).
3. The Leave Administrator will need to adjust holiday quotas as required.
4. The employee will enter time worked (code 9500) on a timesheet and appropriate time off codes (9400 or 9680).
5. A best practice is to enter IT0019 via PA30 to set a reminder to keep track of the employee and create a new Action when he or she returns to full-time.

### Reinstate WC from partial to complete



#### Scenario (cont.):

Employee is now able to expand the hours worked from 4 to 8 per day.

**DO NOT ADJUST IT0008!**

- Action: Reinstatement/Reemployment Workflow (ZPAA076)
  - Reason: **Return from WC Complete**
- After approval received, execute Personnel Action PCR
  - IT000 Actions – Save
  - IT0001 Org Assignment – Save
  - IT0041 Date Specifications – Save
  - IT0040 Objects on Loan – Save or Add Objects on Loan depending upon whether you delimited objects on LOA
  - IT0007 Planned Working Time – Change to appropriate work schedule, and return to negative if applicable

Employee enters time as he or she did before going on Worker's Comp.

SLIDE 50

State of North Carolina  
Office of the State Controller

### Notes:

The new Action is needed because you need to indicate the new reason (WC complete).

### Lesson Review

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In this lesson, you learned to:

- Reinstatement an employee from Leave of Absence


SLIDE 51

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Office of the State Controller

**Notes:**

## Course Map

- Lesson 1: Leave of Absence (LOA) Overview
- Lesson 2: Creating a Leave of Absence
- Lesson 3: Reinstating an Employee from LOA
- Lesson 4: Benefits and Leave of Absence**
- Lesson 5: Course Review



SLIDE 52

State of North Carolina  
Office of the State Controller

**Notes:**

### Lesson Objectives



Upon completion of this lesson, you should be able to:

- Explain the various role responsibilities when an employee is on LOA
- Describe how benefits are affected when an employee is on paid versus unpaid LOA
- Identify how benefits are re-instated when an employee returns from paid versus unpaid LOA

SLIDE 53


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Office of the State Controller

### Notes:

Although this course is focused on the Personnel Administration aspect of LOA, it is important to understand how LOA affects benefits.

### Responsibilities

- Personnel Administrator
  - Enter LOA Action in a timely manner
  - Maintain IT2001
- Benefits Representative
  - Provide information to employee
- Employee
  - Send in premiums when applicable
  - Re-enroll when reinstated when applicable
- BEST
  - Delimit plans when applicable
  - Monitor reinstatement



SLIDE 54

State of North Carolina  
Office of the State Controller

There are several roles involved when an employee goes out on LOA as outlined below.

### Notes:

#### **Personnel Administrator**

- Enter the LOA Action as soon as the employee goes out on leave.
- Maintain IT2001.

#### **Benefits Representative**

- Counsel employees on their benefit plans.
- Provide employee with the OSC HR/Payroll LOA (ZBNS008) or a similar letter.
- Instruct employee to pay NC Flex vendors directly to continue benefits while on an unpaid LOA.
- Instruct employee to pay BEST to continue SHP benefit when applicable.

#### **Employee**


- Send agency specific benefit premiums.
- Send premium payments directly to NC Flex vendors to continue plans.
- Send premium payments directly to BEST for SHP to continue.
- Reenroll in benefit plans within 30 days from return date.

#### **BEST**

- Delimit NC Flex plans when LOA without pay begins.
- Delimit SHP when premium payments are not paid.
- Monitor reinstatement enrollments to ensure employees are reenrolled into appropriate plans.

### Benefits and Leave of Absence using Leave

- Definition: Employee is using approved leave.  
**NOTE:** Does not include employees on Short Term Disability (STD) Benefits.
- Benefits
  - NC Flex and State Health Plan (SHP) benefits will continue uninterrupted.
  - Agency specific benefits will continue unless the agency delimits these plans.



SLIDE 55

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### Notes:

As long as the employee is using leave (which does not include receiving Short-Term Disability nor Worker's Comp benefits or Workers Comp using supplemental leave), the employee's NC Flex and State Health Plan benefits will continue as usual. Deductions for Agency specific benefits will continue unless the Agency delimits (puts an end date) on those plans.

### Leave of Absence not using Leave



- Definition: Employee is **not** using approved leave.

**NOTE:** Includes employees on Short Term Disability (STD) Benefits and employees on a Worker's Compensation and Worker's Comp LOA using supplemental leave.

- Agency Specific Benefits
  - Each agency is responsible for administering these plans according to their agency process.
- NC Flex Plans
  - Will terminate in the OSC HR/Payroll system.
  - Will end the last day of the month premiums were paid.
  - Employees can continue these benefits plans while on unpaid LOA by paying the NC Flex vendors directly.
  - Premiums will not be deducted from STD Benefit or WC payments.

SLIDE 56

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Office of the State Controller

### Notes:

Note that an employee who is receiving Short Term Disability or Worker's Comp benefits is considered to be on leave without pay. That is because their benefit payments are not being made via OSC HR/Payroll.

When on unpaid leave, employees must be responsible for paying NC Flex vendors directly.



### Leave of Absence not using Leave (cont.)



- State Health Plan
  - Employer contribution will continue for the following LOAs:
    - Family Medical Leave
    - Worker's Compensation Leave
    - Military Reserve Active Duty Leave (State Service)
    - STD Leave – Only while receiving STD benefits when an employee has more than 5 years of retirement creditable service (indicated by Contract field on Org Assignment IT0001).
  - Employees are still responsible for their dependent premiums.
  - If dependent premiums are not paid, the benefit plan will be changed to employee only coverage.

SLIDE 57

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Office of the State Controller

### Notes:

There are certain types of leave (listed above) that entitles the employee to have the employer contribution to continue for State Health Plan (SHP). Otherwise, the employee must be responsible for both employer and employee contribution when on unpaid leave.

The premium for State Health Plan will be deducted from the STD benefit on an after-tax basis. **NOTE:** SHP is the only premium deducted from the STD benefit.

### Reinstatement of Benefits



- LOA using Leave
  - If the employee was using leave throughout the LOA period, then benefits will continue without interruption.
- LOA not using Leave
  - Agency Specific Benefits
    - Employee must contact Benefits Representative to reenroll in plans.
  - NC Flex Plans
    - LOAs less than 30 days, employee must restart all plans enrolled prior to the LOA.
    - LOAs greater than 30 days, employee can choose to reenroll in any plans enrolled prior to the LOA.
      - If employee enrolls in plans that he or she was not paying vendors directly, Evidence of Insurability (EOI) and/or waiting periods may apply.
  - Health Care Flexible Spending Account must restart.

SLIDE 58

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### Notes:

### Reinstatement of Benefits (cont.)



- LOA not using Leave (cont.)
  - State Health Plan (SHP)
    - If employee paid premiums, then premiums will now be paid from active earnings.
    - If employee did not pay premiums, then employee must reenroll in the plan to start coverage as an active employee.
  - Reinstatement of NC Flex and State Health Plans benefits
    - Must re-enroll in any plans within 30 days after returning to work.

**Note:** If the 30 day deadline is missed, employees must wait for the next annual enrollment or qualifying event.

SHP allows late enrollment for employee but not dependents.
    - Employees can enroll either through Employee Self-Service (ESS) or by sending BEST a vendor enrollment form.

SLIDE 59

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Office of the State Controller

### Notes:

### Lesson Review



In this lesson you learned to:

- Explain the various role responsibilities when an employee is on LOA
- Describe how benefits are affected with an employee is on paid versus unpaid LOA
- Identify how benefits are re-instated when an employee returns from paid versus unpaid LOA


SLIDE 60

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Office of the State Controller

**Notes:**

## Course Map

- Lesson 1: Leave of Absence (LOA) Overview
- Lesson 2: Benefits and Leave of Absence
- Lesson 3: Creating a Leave of Absence
- Lesson 4: Reinstating an Employee from LOA
- Lesson 5: Course Review**



SLIDE 61

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Office of the State Controller

**Notes:**

### Course Review



In this course, you learned to:

- Describe the various reasons for a Leave of Absence and determine when each is applicable to use
- Execute a Leave of Absence
- Run the Date Monitoring Report
- Reinstate an employee from Leave of Absence

SLIDE 62

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**Notes:**

## Level 1 – Course Evaluation



Enter by accessing LMS

- Provides feedback to training team
- Ensures students experience instruction in an environment and method conducive to learning



Training Schedule  
Self-Reported Training  
Learning Activity Evaluations  
Instructor Schedule  
Learner Approvals

SLIDE 63



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Office of the State Controller

### Notes:

1. Open a new internet browser and type the url:  
<http://rod.sumtotalsystems.com/beacon>
2. At the Log On screen, enter your full email address and password. If you cannot log into LMS, let the instructor know. The instructor can reset your password if you have forgotten it.
3. Click **Logon**.
4. On the blue horizontal bar near the top of your screen, click **Learn**, and then click **Learning Activity Evaluations**.
5. Locate the evaluation that corresponds to the class you've just completed and click the **Start** button to launch it.
6. Complete the evaluation.

## Next Steps

- Monitor OSC HR/Payroll communication
  - BEST Shared Services web site (especially the Updates tab)
  - URL: <http://www.ncosc.net/BEST/>
  - What's New: [http://www.osc.nc.gov/beacon/training/whats\\_new.html](http://www.osc.nc.gov/beacon/training/whats_new.html)
- Review conceptual materials
- Access BEACON Help
  - Access from an SAP transaction
  - URL: <http://help.mybeacon.nc.gov/beaconhelp>
- Practice what you've learned
  - URL: <https://mybeacon.nc.gov>
  - Client 899
  - Use your current NCID user name and password



SLIDE 64

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## Notes:

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

### **Want to practice what you have learned from your desk?**

- Follow the link provided above to access the training client on the OSC HR/Payroll website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

### **Need transactional assistance?**

- Remember to access OSC HR/Payroll help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON Help from within an SAP transaction.





# CONGRATULATIONS



You have completed the course

Please complete your course evaluation!

SLIDE 65

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**Notes:**